

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 31 - Merced County Area Agency on Aging HICAP

From: 07/01/2011 To: 06/30/2012

## Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Type of Activity</b>					
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	3	2	2	6	13
Estimated Number of Attendees	275	53	64	103	495
Estimated Number of Persons Provided Enrollment Assistance	0	7	0	0	7
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	2	2	1	3	8
Estimated Number of Attendees	392	130	35	600	1,157
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	2	2
<b>Mobile InfoVan Events</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Dedicated Enrollment Events</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Received Any Enrollment Assistance	0	0	0	0	0
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	0
Enrollment Assistance with Part D	0	0	0	0	0
Enrollment Assistance with LIS	0	0	0	0	0
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
<b>Radio Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	42	4	43	89
Estimated Number of Persons Reached	0	798,000	62,000	808,000	1,668,000

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<b>Other Print Activity (newspaper articles, fliers, phamplets, etc.)</b>					
Total Number of Print Activities	0	13	8	45	<b>66</b>
Estimated Number of Targeted Persons Reached	0	130,000	50,000	358,310	<b>538,310</b>
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	4	4	3	6	<b>17</b>
Total Hours for Length of Activities	1.00	3.00	36.00	17.00	<b>57.00</b>
<b>HICAP In-Kind Paid Staff</b>					
Total Presenters	0	0	0	0	<b>0</b>
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>HICAP Volunteer Staff</b>					
Total Presenters	0	0	0	3	<b>3</b>
Total Hours for Length of Activities	0.00	0.00	0.00	3.00	<b>3.00</b>
<b>Other Presenters</b>					
Total Presenters	0	0	0	0	<b>0</b>
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>Area of Focus</b>					
	2			1	
Dual Eligible with Mental Illness	4	2	0	6	<b>12</b>
Employer Termination - COBRA	1	0	0	0	<b>1</b>
General HICAP Information	5	59	14	96	<b>174</b>
Grievances / Appeals - Plan Issues	0	0	0	0	<b>0</b>
Long-Term Care / Insurance	0	0	0	0	<b>0</b>
Low Income Subsidy (LIS) / Application Assistance	3	29	2	22	<b>56</b>
Medicare (Parts A & B)	3	2	3	8	<b>16</b>
Medicare Advantage (Part C)	2	1	1	4	<b>8</b>
Medicare Fraud / Abuse	0	0	0	2	<b>2</b>
Medicare Prescription Drug Coverage (Part D)	1	37	3	31	<b>72</b>
Medigap / Medicare Supplements	2	2	1	5	<b>10</b>
Non-Medicare Fraud/Abuse	0	0	0	0	<b>0</b>
Other Topics / Issues (Health Specific)	1	0	0	4	<b>5</b>

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	0	0	0
Preventive Care Benefits	2	1	2	8	13
QMB/SLMB/QI	4	2	1	6	13
Volunteer Recruitment	3	0	3	2	8
<b>Targeted Audience</b>					
African American	1	55	13	89	158
American Indian or Native Alaskan	1	55	12	86	154
Asian Indian	1	56	12	87	156
Caucasian	2	58	15	96	171
Chinese	1	55	12	87	155
Disabled	3	57	14	92	166
Dual Eligible Groups	1	56	13	91	161
Employer Related Groups	1	52	12	87	152
Family Member/Caregiver of Beneficiary	1	55	12	87	155
Filipino	2	56	14	89	161
Guamanian or Chamorro	1	54	12	87	154
Hispanic / Latino	5	57	12	94	168
Hmong	1	55	12	89	157
Japanese	1	56	12	87	156
Korean	1	55	12	87	155
Low Income	2	57	11	91	161
Medicare Beneficiaries	3	55	13	89	160
Medicare Pre-Enrollees	1	55	12	87	155
Mental Health	1	55	12	88	156
Mental Health Professionals	1	55	12	87	155
Native Hawaiian	1	55	11	87	154
Other	0	3	0	3	6
Other Asian	1	55	12	87	155
Other Pacific Islander	1	55	12	87	155
Partnership Outreach	1	0	1	2	4
Presentations to Groups in Language Other than English	0	0	1	1	2
Rural	4	55	12	89	160
Samoan	1	54	12	86	153
Social Work Professionals	1	55	13	86	155
Some Other Race or Ethnicity	1	55	12	87	155
Vietnamese	1	54	12	88	155

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	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Web Site Hits</b>					
Total Web Hits to Local HICAP Web Site	0	0	0	0	0
<b>Literature from Events</b>					
General HICAP Brochure	300	130	64	400	894
"Taking Care of Tomorrow"	0	0	0	0	0
Other Publications (Created by or on Behalf of Local HICAP)	667	183	99	322	1,271
<b>Other Literature</b>					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	0	0	0	0

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

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From: 07/01/2011 To: 06/30/2012

## Client Contacts &amp; Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	182	454	207	221	1,064
Total Finalized Intakes	177	493	215	226	1,111
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	56	81	49	93	279
Aging into Medicare Postacd - CDA HICAP	2	0	0	1	3
CDA HICAP	0	0	1	3	4
CHA	0	1	0	0	1
CMS/Medicare	15	39	12	6	72
Friend/Relative	12	56	23	26	117
InfoVan	0	0	0	0	0
Internet	0	0	0	0	0
Mailings	0	0	0	0	0
Media	4	2	1	10	17
Other	6	6	8	7	27
Presentations	2	3	2	7	14
Previous Contacts	78	302	119	72	571
State Website	0	1	0	0	1
Missing/Not Collected	2	2	0	1	5
<b>Mode of Client Contact</b>					
Quick Call Contacts	194	495	229	237	1,155
Contacts by Telephone	26	102	121	163	412
Contacts In Person at home	0	5	1	3	9
Contacts In Person at site	173	458	216	216	1,063
Contacts by E-Mail	0	0	0	0	0
Contacts by Mail/Fax	0	0	0	0	0
Total Number of Client Contacts:	393	1,060	567	619	2,639
<b>Contact Status Types</b>					
General info	1	5	1	207	214
Detailed Assistance	137	547	294	425	1,403
Problem Solving/Resolution	61	13	43	45	162
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	0.00	0.00	0.00	4.35	4.35
Volunteer	83.05	224.10	112.00	0.00	419.15
Paid	72.15	226.00	95.07	229.00	622.22
In-Kind	0.00	0.00	0.00	0.00	0.00
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	87	183	97	104	471
<b>Race</b>					
African American/Black	9	14	6	8	37

From: 07/01/2011 To: 06/30/2012

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	0	4	5	3	12
Caucasian/White	72	267	97	97	533
Native Hawaiian	0	1	0	0	1
Guamanian or Chamoro	0	1	1	0	2
Samoan	0	0	0	0	0
Asian Indian	1	0	0	5	6
Chinese	0	4	0	0	4
Filipino	0	3	4	0	7
Japanese	0	3	0	0	3
Hmong	5	3	3	2	13
Korean	1	3	0	1	5
Vietnamese	0	0	1	0	1
Other Pacific Islander	0	0	0	0	0
Other Asian	1	0	0	4	5
Two or More Race	0	2	1	0	3
Some Other race	88	181	97	105	471
Not Collected	0	7	0	1	8
<b>Gender</b>					
Female	105	304	122	123	654
Male	71	189	92	102	454
Not Collected	1	0	1	1	3
<b>Monthly Income</b>					
Less than 150% of FPL	94	242	134	123	593
Equal To/Greater than 150% of FPL	75	228	70	95	468
Not collected	8	23	11	8	50
<b>Client Asset Limits</b>					
Below LIS Asset limit	14	45	23	18	100
At or Above LIS Asset Limit	1	4	1	2	8
Not Collected	162	444	191	206	1,003

From: 07/01/2011 To: 06/30/2012

## Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Total Clients that Checked Yes as Being</b>					
Veteran	19	49	22	12	102
Limited English Proficient (LEP)	49	90	38	59	236
Dual Eligible	86	149	88	94	417
Medicare Status Due to Disability	36	80	50	58	224
Dual Eligible due to Mental Disability	14	6	8	7	35
Applying/Receiving Social Security/Medicare Disability	37	82	48	60	227
<b>Age</b>					
Under 60	23	39	25	26	113
60-64	9	34	24	38	105
65-74	94	244	98	97	533
75-84	37	122	45	45	249
85+	14	54	23	20	111
Not Collected	0	0	0	0	0
<b>Marital Status</b>					
Married	85	233	99	110	527
Never Married	16	34	11	17	78
Separated	4	11	6	11	32
Divorced	20	71	40	31	162
Widowed	46	130	55	52	283
Domestic Partner	1	0	0	0	1
Not Collected	5	14	4	5	28
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	42	175	56	50	323
Estimated Dollars Saved	\$97,479.68	\$325,859.38	\$197,296.00	\$233,622.60	\$854,257.66

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Topics/Needs Discussed					
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	12	10	19	25	66
Benefit Comparisons/Explanation/Coverge Changes	6	14	8	18	46
Appeals/Grievances	0	0	1	3	4
Billings/Claims	4	3	4	8	19
Fraud/Abuse	0	0	0	0	0
Quality of Care	0	0	0	0	0
LTC/LTCI					
Enrollment/Eligibility Assistance	5	0	1	1	7
Billings/Claims	0	0	0	0	0
LTC Partnership	0	0	0	0	0
Appeal/Greivances	0	0	0	0	0
Fraud/Abuse	0	0	0	0	0
Other LTC	0	1	0	1	2
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	26	14	30	38	108
Benefit Explanation	0	0	1	2	3
Appeals/Grievances	0	0	0	0	0
Billings/Claims	1	0	0	3	4
Fraud/Abuse	0	0	0	0	0
Disenrollment/Coverage Changes	0	1	1	0	2
Quality of Care	0	0	0	0	0
Plan Comparison	12	12	8	19	51
Marketing/Sales Complaints/Issues	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	9	42	11	23	85
Benefit Explanation	1	3	2	4	10
Appeals/Grievances	1	0	0	1	2
Billings/Claims	1	0	5	5	11
Fraud/Abuse	0	0	0	0	0
Coverage Changes/Disenrollment	1	4	3	2	10
Plan Non Renewal	0	0	0	0	0
Plan Comparison	4	34	4	15	57
Enrollment/Enrollment Asistance	0	7	1	6	14
Quality of Care	0	0	0	0	0
Marketing/Sales Complaints or Issues	0	0	0	0	0
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	33	28	36	33	130
Medi-Cal Application Assistance	15	15	23	12	65



From: 07/01/2011 To: 06/30/2012

	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	3	1	1	3	8
MSP Application Assistance	3	2	1	3	9
Medi-Cal/QMB Claims	0	0	0	1	1
Fraud/Abuse	0	0	0	0	0
Other	9	3	3	4	19
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	0	1	1	1	3
Military Benefits	1	0	2	0	3
COBRA	0	0	0	1	1
Mental Health Topics	0	0	0	1	1
Fraud/Abuse	0	0	0	0	0
Other Health Insurance	0	0	0	0	0
Other	12	10	4	21	47
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	31	212	37	20	300
Eligibility/Screening	70	375	92	119	656
Plan Comparison	77	402	83	106	668
Enrollment/Anrollment Assistance	34	226	36	64	360
Billings/Claims	4	0	5	7	16
Coverage Changes	1	0	2	1	4
Re-enrollment	0	1	2	0	3
Disenrollment	0	0	0	1	1
TROOP	0	0	0	0	0
Other	2	5	4	4	15
<b>LIS / Extra Help</b>					
Eligibility / Screening	18	55	26	21	120
Benefit Explanation	18	49	25	20	112
Application Assistance	18	47	25	20	110
Claims/Billings	0	0	0	0	0
Appeals / Grievances	0	0	0	0	0
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	0	0	0	0	0
PPARx	0	0	0	0	0
Military Drug Benefit	0	0	0	0	0
Manufacturer Program	0	0	0	0	0
Other	0	0	0	0	0
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	0	0	1	0	1
Lag Time	0	0	0	0	0
Multiple Enrollment	0	0	0	0	0
Poor Training of Agents	0	0	1	0	1
Poor Training of CSR	0	0	1	0	1

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	Topics/Needs Discussed				
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	0	0	0	0	0
Agent fraud/abuse	0	0	0	0	0
Formulary problems/changes	3	0	3	0	6
Dosage problem	2	0	0	0	2
Data problems	1	0	4	2	7
Delay in medications	3	0	5	3	11
Incorrect Co-Pay/Can't Afford Co-Pay	2	0	6	1	9
Client reached donut hole	2	0	0	0	2
SSA Premium withheld	0	0	0	0	0
Appeals/Grievances	0	0	0	0	0
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
<b>HICAP Legal Services</b>					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	0	0	0	0
Cases Opened	0	0	0	0	0
Cases Closed	0	0	0	0	0
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	0	0	0	0	0
HICAP Legal Clients that Saved	0	0	0	0	0
Estimated Financial Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

**Health Insurance Counseling and Advocacy (HICAP) Aggregate Report****Program: PSA 31 - Merced County Area Agency on Aging HICAP**

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**Complaints Filed**

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	0	0	<b>0</b>
CMS:	0	0	1	2	<b>3</b>
Part D Plan:	0	0	1	1	<b>2</b>
SMP:	0	0	0	0	<b>0</b>
Urgent Fax:	0	0	0	0	<b>0</b>
800 Medicare:	0	0	1	0	<b>1</b>
Other:	1	0	0	1	<b>2</b>
TOTAL MEDICARE PART D COMPLAINTS	1	0	3	4	<b>8</b>
<b>All Other Complaints</b>					
APS :	0	0	0	0	<b>0</b>
CDI:	0	0	0	0	<b>0</b>
CMS:	0	0	0	0	<b>0</b>
QIO:	0	0	0	0	<b>0</b>
SMP:	0	0	0	0	<b>0</b>
Other:	0	0	0	0	<b>0</b>
TOTAL ALL OTHER COMPLAINTS	0	0	0	0	<b>0</b>
<b>800 Medicare Line Issues</b>					
Total number of Calls with Issues	6	16	20	37	<b>79</b>
Total duration of calls	0.51	2.15	3.29	7.08	<b>13.03</b>